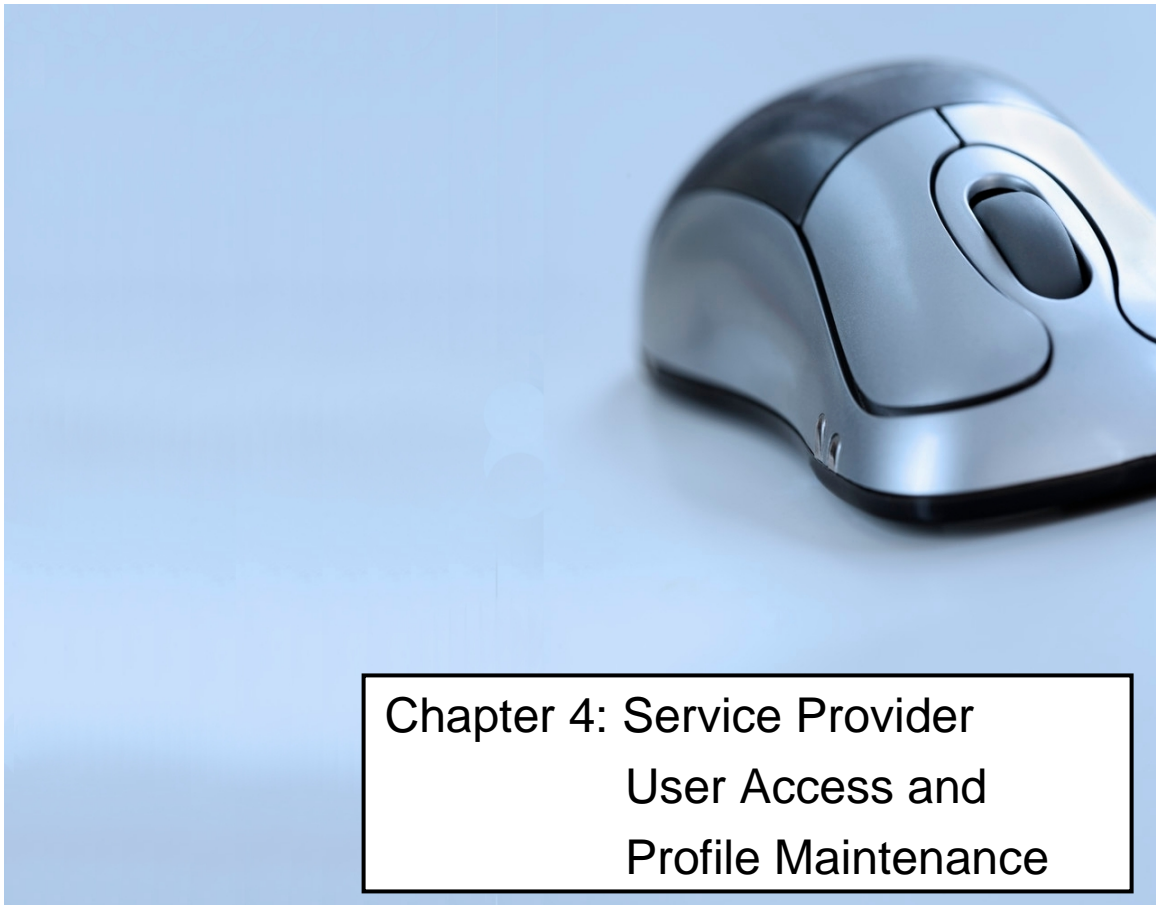


# **EOIS Case Management System Service Provider User Guide**



**Version: 2.5  
July 2014**

### Document History

Version #	Date	Description
1.0	July 23, 2010	Initial version released prior to the launch of the system on August 4, 2010.
1.01	August 26, 2010	Minor change to screenshots.
1.02	September 28, 2010	Added section 4.8 View Ministry Contacts.
1.03	May 2011	Added system steps to 4.5 De-Activating Service Provider Users.
1.04	December 2011	Added to 4.6.2 De-activating a User: <ul style="list-style-type: none"><li>• The user needs to input a <b>To</b> date when removing a user from the system, regardless of how long they will be leaving the organization.</li></ul>
2.0	January 2012	Review and edits for Release 3.0.
2.1	April 2012	Updates to: <ul style="list-style-type: none"><li>• 4.2 Creating Service Provider Members</li><li>• 4.4.1 Modify Details</li><li>• 4.5 Resetting Pin</li><li>• 4.6 Deactivating Service Provider Users</li><li>• 4.6.1 Reassigning Service Plans</li><li>• 4.7 Reactivating a User</li><li>• 4.9 View Ministry Contacts</li></ul>
2.2	September 2012	Incorporates changes for Release 3.1: <ul style="list-style-type: none"><li>• 4.6.2 Reassigning Reviews(new section)</li><li>• 4.11 Creating and Modifying Service Provider Profile and Service Delivery Sites Contact Information</li></ul>

## EOIS Case Management System Service Provider User Guide

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2.3	April 2013	<p>Incorporates changes for Release 3.2.</p> <p>New sections:</p> <ul style="list-style-type: none"><li>• 4.12 Assigning a user as an Ontario Self-Employment Benefit Case Reviewer</li><li>• 4.11.1 Assigning a Self Service Email Address</li></ul> <p>Updates to:</p> <ul style="list-style-type: none"><li>• 4.6 Deactivating Service Provider Users</li><li>• 4.11.2 Modifying the Service Delivery Site Home Page</li><li>• 4.13 Field Values Table</li></ul>
2.4	August 2013	<p>Updates to:</p> <ul style="list-style-type: none"><li>• 4.6 Deactivating Service Provider Users</li><li>• 4.6.1 Reassigning Service Plans</li></ul>
2.5	July 2014	<p>Updates to reflect new Release 4.0 user interface</p>

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### 4 Service Provider User Access and Profile Contact Information Maintenance

The Case Management System (the system) is a component of the Employment Ontario Information System (EOIS) that supports the ministry and service providers in administering and delivering Employment Ontario programs and services. Both ministry and service provider staff are given access to the system to perform their identified roles.

The set-up of service provider users is initiated by the ministry through the establishment of individual service provider profiles. These profiles include information on the service provider at the corporate level and the service delivery site level. The service provider profile includes information on the organization's legal name, business number, contact staff (called members) and service delivery site details. These profiles are used across the EOIS for the purpose of contract management, case management and reporting. The management of the service provider profile is a shared responsibility between the ministry and the service provider.

The ministry creates and maintains the core service provider and service delivery site data. The ministry must assign the system user role of Service Provider Manager to select service provider members. This system user role comes with the responsibility of the Service Provider Registration Authority (SPRA) business role. The member with the Service Provider Manager user role is the only person who can add, maintain and deactivate service provider members as system users, report users and contacts within their own service provider organization and associated service delivery sites. Only the ministry can add, maintain or deactivate the Service Provider Manager system user role.



Each service provider is assigned a maximum number of users in the system. The system will not allow the Service Provider Manager to add users beyond this assigned number and will display an error message if this is attempted. If a change in the maximum number of users is required, the Service Provider Manager will have to contact his or her ministry representative.

### 4.1 Roles and Responsibilities

There are four types of Service Provider Members in the system:

- **Service Provider Member - System User** – a service provider member who is given a system. There are three system user roles that can be assigned to service provider members:
  1. Service Provider Manager (Ministry assigned only)
    - create, maintain and de-activate user accounts
    - maintain contact information in the service provider profile
    - create, view, update and close client profiles
    - create, view, update and close service plans
    - Create, view and update resource and information data.
  2. Service Provider Case Worker
    - create, view, update and close client profiles
    - create, view, update and close service plans.
  3. Service Provider Administrator
    - create, view, update and close client profiles
    - create, view, update and close service plans
    - create, view and update resource and information data
    - maintain contact information in the service provider profile.
- **Service Provider Member - Non-System User** – a key individual contact at a corporate service provider level such as an executive director or manager who does not require access to the system. These members are not counted in the maximum number of system users for each service provider.
- **Service Delivery Site Member** – a key individual contact at the service delivery site level who does not require access to the system. If service delivery site staff requires access to the system, he or she must become a service provider member to be assigned a system role.
- **Service Provider Member – Reporting Role** – a key individual contact at the corporate service provider level who does or does not require access to the system but requires access to the reporting tool for operational and performance reports.

## EOIS Case Management System Service Provider User Guide



The system's use of the term "member" is synonymous with the business term "contact." A member who is referred to as a system user has system access responsibility; not all members are system users.

The following table lists the actions that each system user role can perform in the Service Provider Management module of the system:

	Search/View Service Provider/Service Delivery Site	Modify Specific Service Provider Profile Information	Register/Modify Service Provider Members/Users	Register/Modify Service Delivery Site Members
Ministry Regional Administrator	✓	✓	✓	✓
Service Provider Manager (SPRA)	✓	✓	✓	✓
Service Provider Caseworker	✓			
Service Provider Administrator	✓	✓		

### 4.2 Creating Service Provider Members

The service provider member who has been given the business role of the Service Provider Registration Authority (SPRA) is assigned the Service Provider Manager system user role by the ministry. This gives this member the authority to create, modify and deactivate members for their specific organization with both system, non-system and reporting user roles. The Service Provider Manager system user role can only assign members with the system roles of Service Provider Caseworker and Service Provider Administrator and with the reporting roles of SP Manager and SP Staff.

#### Required Prerequisite Steps

- Before a service provider member can be set up as a system user, the member must complete the Service Provider Staff CaMS Registration form.
- The SPRA must validate the member's identity and approve the Service Provider Staff CaMS Registration form.
- The service provider must not have exceeded the "License Allocation" that has been negotiated with their ministry representative. This number can be viewed on the *Service Provider Home* page in the **Details** information panel and compared to the system users displayed on the *Service Provider Members* page. Providers can have additional user accounts beyond their initial license allocation figure, if required. However, the provider needs to be aware that all users cannot be on the system at the same time. The maximum amount of users logged on to EOIS-CaMS at any one time is equal to their license allocation.

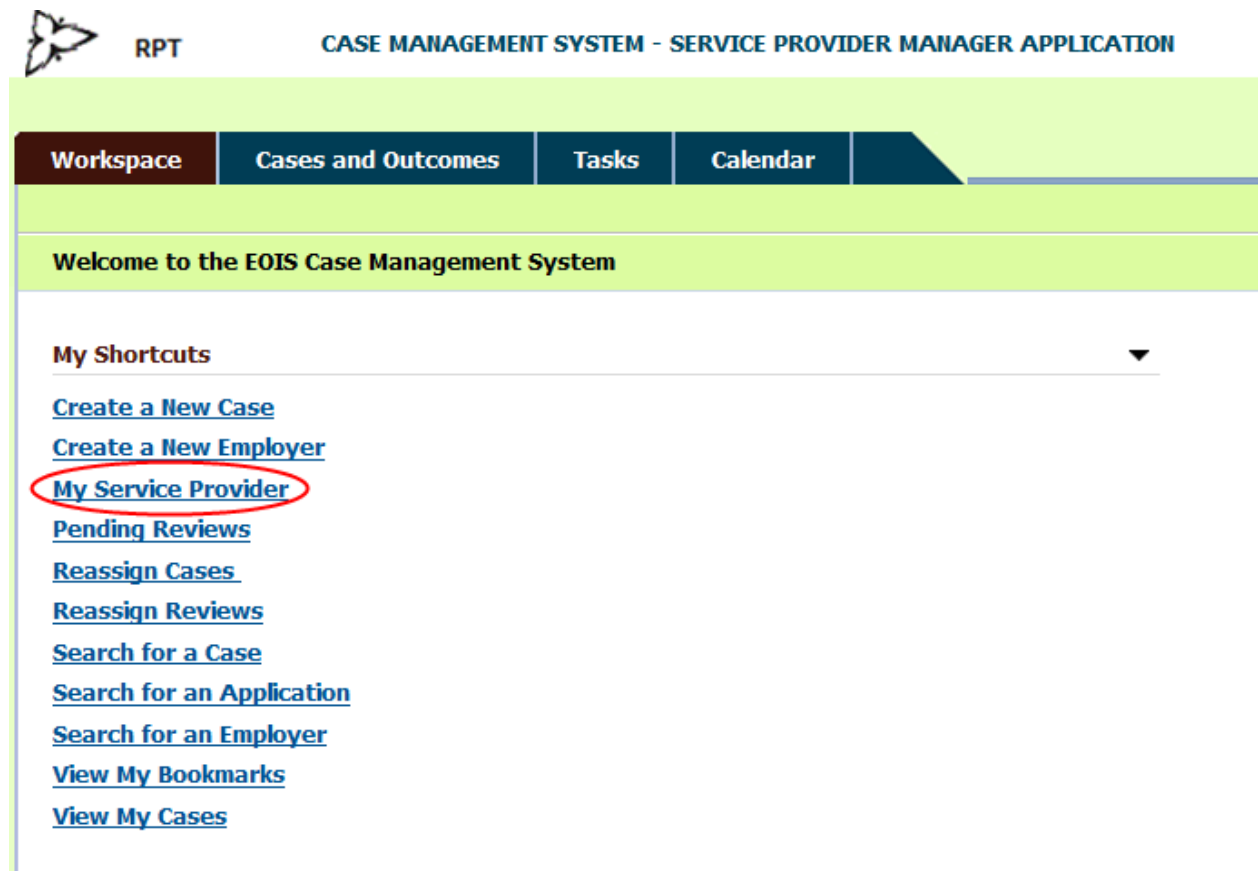


# EOIS Case Management System Service Provider User Guide

## System Steps

### ➡ Step 1: *Workspace*

Click My Service Provider in the **My Shortcuts** list to navigate to the *Service Provider Home* page.



RPT CASE MANAGEMENT SYSTEM - SERVICE PROVIDER MANAGER APPLICATION

Workspace Cases and Outcomes Tasks Calendar

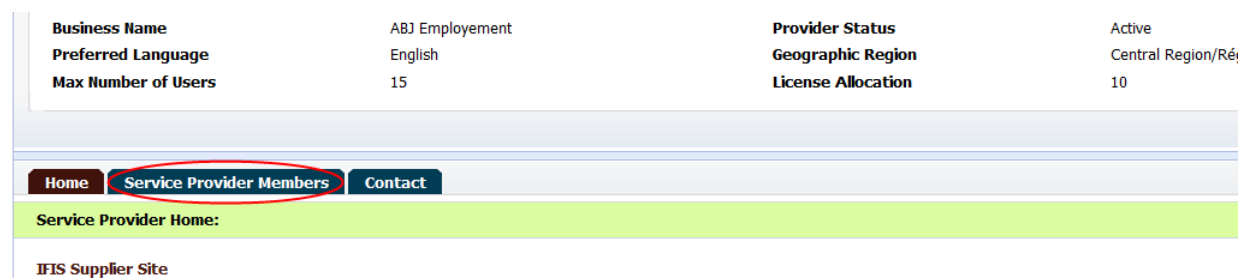
Welcome to the EOIS Case Management System

My Shortcuts ▼

- [Create a New Case](#)
- [Create a New Employer](#)
- [My Service Provider](#)
- [Pending Reviews](#)
- [Reassign Cases](#)
- [Reassign Reviews](#)
- [Search for a Case](#)
- [Search for an Application](#)
- [Search for an Employer](#)
- [View My Bookmarks](#)
- [View My Cases](#)

### ➡ Step 2: *Service Provider Home*

Click the **Service Provider Members** tab.



Business Name	ABJ Employment	Provider Status	Active
Preferred Language	English	Geographic Region	Central Region/Réi
Max Number of Users	15	License Allocation	10

Home Service Provider Members Contact

Service Provider Home:

IFIS Supplier Site

# EOIS Case Management System Service Provider User Guide

## ➤ Step 3: Service Provider Members

Click New.

Home Service Provider Members Contact

Service Provider Members **New** \* required field

Search Criteria

Display Inactive Members ☐

Search Reset

Name	Position	Main Contact	CaMS Role	Reporting Role	Status
<a href="#">Madame Noir</a>		No	Service Provider Case Worker	SP Staff	Active
<a href="#">Madame Vert</a>		No	Service Provider Manager	SP Manager	Active

## ➤ Step 4a: Create Service Provider Member-System user with or without a reporting role

Complete the required fields.

Create Service Provider Member \* required field

Details

Title \* Ms. Preferred Language \* English

Member Name \* Mindy Lynns Main Contact ☐

Email \* mindy@beta.com Position Case Worker

From 25/6/2014

Area Code \* 416 Local Number \* 5555555 Extension TTY ☐

Service Provider User

CaMS Role Service Provider Case Worker Reporting Role SP Staff

Identity Verification


Challenge Question/ Answer

Save Cancel

## EOIS Case Management System Service Provider User Guide

---

A unique email address must be entered for members assigned a **User Role**.

	<p>If a member is assigned a user role, there must be a unique email address entered for that member. This is critical as the system will generate two emails to that member to complete the registration process. The first email contains the ONE-key enrollment number and the second email contains the PIN and link to the ONE-key login page. The system will validate the uniqueness and format of the email address. The system will not allow the screen to be saved if this validation fails and will provide an error message.</p>
---	---

If this member is the main contact for the service provider, select the **Main Contact** checkbox. The position field may also be completed, but it is optional.

To access the system, the service provider member requires a user role. Select the appropriate **CaMS Role**: Service Provider Caseworker or Service Provider Administrator.

To access reports, the service provider member also requires a reporting role. Select the appropriate **Reporting Role**: SP Manager or SP Caseworker. If a reporting role is not required, the field can be left blank.

Once completed, click Save.

## EOIS Case Management System Service Provider User Guide

### ➡ **Step 4b:** *Create Service Provider Member- Non-System user with or without a Reporting Role*

Complete the required fields.

Create Service Provider Member

\* required field

**Details**

Title \* Ms. Preferred Language \* English

Member Name \* Mindy Lynns Main Contact ☐

Email \* mindy@beta.com Position Case Worker

From 25/6/2014

Area Code \* 416 Local Number \* 5555555 Extension TTY ☐

**Service Provider User**

CaMS Role Reporting Role

**Identity Verification**

Challenge Question/Answer

Save Cancel

If this member is the main contact for the service provider, select the **Main Contact** checkbox. The position field may also be completed, but it is optional.

Since the service provider member does not require a system role, do not select any **CaMS Role** and leave the field blank. If this member requires a reporting role, select either the **Reporting Role** of SP Manager or SP Caseworker. If a reporting role is not required, leave this field blank as well.

Once completed, click Save.

## EOIS Case Management System Service Provider User Guide

### ➤ Step 5a: Service Provider Member - System user

Click the appropriate Name for the service provider member on the *Service Provider Member* page to ensure that all information is correct.

[Home](#) [Service Provider Members](#) [Contact](#)

**Service Provider Members**

**Search Criteria**

**Display Inactive Members** ☐

<u>Name</u>	<u>Position</u>	<u>Main Contact</u>
<a href="#">Madame Noir</a>		No
<a href="#">Madame Vert</a>		No
<a href="#">Mindy Linds</a>		No
<a href="#">Miss Black</a>		No

[Home](#) [Contact](#)

**Service Provider Member Home**

**Details**

<b>Title</b>	Ms.	<b>Preferred Language</b>	English
<b>Member Name</b>	Mindy Linds	<b>Main Contact</b>	No
<b>Phone</b>	(416)555-5555	<b>Email</b>	mlynds@beta.ca
<b>Position</b>		<b>Status</b>	Active
<b>From</b>	25/6/2014	<b>To</b>	

**Service Provider User**

<b>CaMS Role</b>	Service Provider Case Worker	<b>Reporting Role</b>	SP Staff
<b>User Creation Date</b>	25/6/2014		

**Comments**

## EOIS Case Management System Service Provider User Guide

### ➤ Step 5b: Service Provider Member - Non-System user

Click the appropriate Name for the service provider member on the *Service Provider Member* page to ensure that all information is correct.

[Home](#) [Service Provider Members](#) [Contact](#)

**Service Provider Members**

**Search Criteria**

**Display Inactive Members** ☐

<u>Name</u>	<u>Position</u>	<u>Main Contact</u>
<a href="#">Madame Noir</a>		No
<a href="#">Madame Vert</a>		No
<a href="#">Mindy Linds</a>		No
<a href="#">Miss Black</a>		No

[Home](#) [Contact](#)

**Service Provider Member Home**

**Details**

<b>Title</b>	Ms.	<b>Preferred Language</b>	English
<b>Member Name</b>	Mindy Linds	<b>Main Contact</b>	No
<b>Phone</b>	(416)555-5555	<b>Email</b>	mlynds@beta.ca
<b>Position</b>		<b>Status</b>	Active
<b>From</b>	25/6/2014	<b>To</b>	

**Service Provider User**

<b>CaMS Role</b>	<b>Reporting Role</b>
<b>User Creation Date</b>	

# EOIS Case Management System Service Provider User Guide

## 4.3 Update Identity Verification

In order to verify the identity of SPRAs (aka Service Provider Managers), the system must capture a question and answer field on the Service Provider Member page. Service Provider Manager Users are able to update their own **Challenge Question/Answer**.

### System Steps

#### ➤ Step 1: Service Provider Home

Click the **Service Provider Members** tab.

<b>Business Name</b>	ABJ Employment	<b>Provider Status</b>	Active
<b>Preferred Language</b>	English	<b>Geographic Region</b>	Central Region/Ré
<b>Max Number of Users</b>	15	<b>License Allocation</b>	10

[Home](#) [Service Provider Members](#) [Contact](#)

Service Provider Home:

[IFIS Supplier Site](#)

#### ➤ Step 2: Service Provider Members

Click the Service Provider Manager user's own name.

<a href="#">Home</a> <a href="#">Service Provider Members</a> <a href="#">Contact</a>					
Service Provider Members <a href="#">New</a>					
* required f					
<a href="#">Madame Noir</a>	No	Service Provider Case Worker	SP Staff	Active	
<a href="#">Madame Vert</a>	No	Service Provider Manager	SP Manager	Active	
<a href="#">Mindy Linds</a>	No	Service Provider Case Worker	SP Staff	Active	
<a href="#">Miss Black</a>	No	Service Provider Case Worker	SP Staff	Active	
<a href="#">Miss Green</a>	No	Service Provider Manager	SP Manager	Active	
<a href="#">Mister Black</a>	No	Service Provider Case Worker	SP Staff	Active	
<a href="#">Mister Green</a>	No	Service Provider Manager	SP Manager	Active	

## EOIS Case Management System Service Provider User Guide

### ➤ Step 3: Service Provider Member Home

Click Change next to **Challenge Question/Answer**

The **Challenge Question/Answer** is mandatory for all Service Provider Managers. This extra security step will aid ministry staff when a Service Provider Manager requests a PIN reset.

Home Contact

Service Provider Member Home

Details

Title	Mr.	Preferred Language	English <a href="#">Change</a>
Member Name	Mister Green	Main Contact	No
Phone	(416)555-5556	Email	mg@abj.com
Position		Status	Active
From	24/6/2014	To	

Service Provider User

CaMS Role	Service Provider Manager	Reporting Role	SP Manager
User Creation Date	24/6/2014		

Identity Verification

Challenge Question/Answer	challenge question/answer <a href="#">Change</a>
---------------------------	--

Comments

### ➤ Step 4: Modify Service Provider Member Challenge Question

Enter **Challenge Question/Answer**, and click Save.

Modify Service Provider Member Challenge Question: ✕

\* required field

Identity Verification

Challenge Question/Answer

[Save](#) [Cancel](#)



### 4.4 Modify Service Provider Members

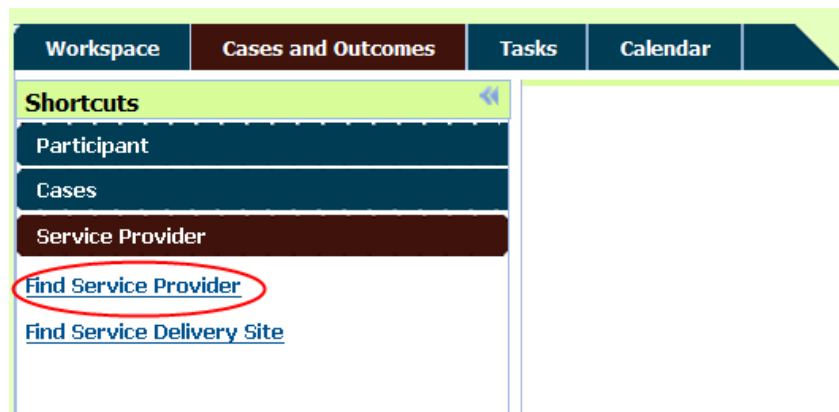
The service provider member with the Service Provider Manager user role can modify other service provider member details and user roles (Service Provider Caseworker and Service Provider Administrator); however, if the Service Provider Manager user role has to be modified, the service provider member must contact the ministry.



All user roles have the ability change their own **Preferred Language** and **Challenge Question/Answer**. To display the new selected language, the user must first log out, and then log back into the system.

For the Service Provider Caseworker role, users must use the Find Service Provider action from the Shortcuts Panel and select their name from the **Service Provider Members** tab.

1.



2.

Home	Service Provider Members	Contact
Service Provider Members		
<a href="#">Madame Vert</a>	No	Service Provider Manager SP Manager Active
<a href="#">Mindy Linds</a>	No	Service Provider Case Worker SP Staff Active
<a href="#">Miss Black</a>	No	Service Provider Case Worker SP Staff Active
<a href="#">Miss Green</a>	No	Service Provider Manager SP Manager Active
<a href="#">Mister Black</a>	No	Service Provider Case Worker SP Staff Active

# EOIS Case Management System Service Provider User Guide

	<div><a href="#">Home</a> <a href="#">Contact</a></div> <div>Service Provider Member Home</div> <div><b>Details</b></div> <table><tr><td><b>Title</b></td><td>Mr.</td><td><b>Preferred Language</b></td><td>English <a href="#">Change</a></td></tr><tr><td><b>Member Name</b></td><td>Mister Black</td><td><b>Main Contact</b></td><td>No</td></tr><tr><td><b>Phone</b></td><td>(416)555-5577</td><td><b>Email</b></td><td>mb@abj.com</td></tr><tr><td><b>Position</b></td><td></td><td><b>Status</b></td><td>Active</td></tr><tr><td><b>From</b></td><td>24/6/2014</td><td><b>To</b></td><td></td></tr></table> <div><b>Service Provider User</b></div> <table><tr><td><b>CaMS Role</b></td><td>Service Provider Case Worker</td><td><b>Reporting Role</b></td><td>SP Staff</td></tr><tr><td><b>User Creation Date</b></td><td>24/6/2014</td><td></td><td></td></tr></table> <div><b>Identity Verification</b></div> <table><tr><td><b>Challenge Question/ Answer</b></td><td>challengequestion/answer <a href="#">Change</a></td></tr></table> <div><b>Comments</b></div>	<b>Title</b>	Mr.	<b>Preferred Language</b>	English <a href="#">Change</a>	<b>Member Name</b>	Mister Black	<b>Main Contact</b>	No	<b>Phone</b>	(416)555-5577	<b>Email</b>	mb@abj.com	<b>Position</b>		<b>Status</b>	Active	<b>From</b>	24/6/2014	<b>To</b>		<b>CaMS Role</b>	Service Provider Case Worker	<b>Reporting Role</b>	SP Staff	<b>User Creation Date</b>	24/6/2014			<b>Challenge Question/ Answer</b>	challengequestion/answer <a href="#">Change</a>
<b>Title</b>	Mr.	<b>Preferred Language</b>	English <a href="#">Change</a>																												
<b>Member Name</b>	Mister Black	<b>Main Contact</b>	No																												
<b>Phone</b>	(416)555-5577	<b>Email</b>	mb@abj.com																												
<b>Position</b>		<b>Status</b>	Active																												
<b>From</b>	24/6/2014	<b>To</b>																													
<b>CaMS Role</b>	Service Provider Case Worker	<b>Reporting Role</b>	SP Staff																												
<b>User Creation Date</b>	24/6/2014																														
<b>Challenge Question/ Answer</b>	challengequestion/answer <a href="#">Change</a>																														

3.

## System Steps

### ➔ Step 1: Workspace

Click My Service Provider from the **My Shortcuts** list to navigate to the *Service Provider Home* page.

RPT CASE MANAGEMENT SYSTEM - SERVICE PROVIDER MANAGER APPLICATION

Workspace Cases and Outcomes Tasks Calendar

Welcome to the EOIS Case Management System

**My Shortcuts**

- [Create a New Case](#)
- [Create a New Employer](#)
- [My Service Provider](#)
- [Pending Reviews](#)
- [Reassign Cases](#)
- [Reassign Reviews](#)
- [Search for a Case](#)
- [Search for an Application](#)
- [Search for an Employer](#)
- [View My Bookmarks](#)
- [View My Cases](#)

# EOIS Case Management System Service Provider User Guide

## ➡ Step 2: Service Provider Home

Select the **Service Provider Members** tab.

<b>Business Name</b>	ABJ Employment	<b>Provider Status</b>	Active
<b>Preferred Language</b>	English	<b>Geographic Region</b>	Central Region/Région
<b>Max Number of Users</b>	15	<b>License Allocation</b>	10

[Home](#) [Service Provider Members](#) [Contact](#)

Service Provider Home:

[IFIS Supplier Site](#)

## ➡ Step 3: Service Provider Members

Click Edit from the **Action Button** next to the member that needs to be modified to navigate to that member's home page.

[Home](#) [Service Provider Members](#) [Contact](#)




Service Provider Members [New](#) [Refresh](#) [Print](#)

\* required field

Search Criteria

Display Inactive Members ☐

[Search](#) [Reset](#)

Name	Position	Main Contact	CaMS Role	Reporting Role	Status	
<a href="#">Madame Noir</a>		No	Service Provider Case Worker	SP Staff	Active	
<a href="#">Madame Vert</a>		No	Service Provider Manager	SP Manager	Active	
<a href="#">Mindy Linds</a>		No	Service Provider Case Worker	SP Staff	Active	

# EOIS Case Management System Service Provider User Guide

## 4.4.1 Modify Details

Edit the fields in the **Details** information panel as required.

Modify Service Provider Member

\* required field

Details

Title \*

Ms.

Member Name \*

Madame Noir

Email \*

mdn@abj.com

From

24/6/2014

Preferred Language \*

French

Main Contact

☐

Position

Service Provider User

CaMS Role

Service Provider Case Worker

Reporting Role

SP Staff

Identity Verification

Challenge Question/Answer

Comments

Save

Cancel



The email address has to be unique to that member.

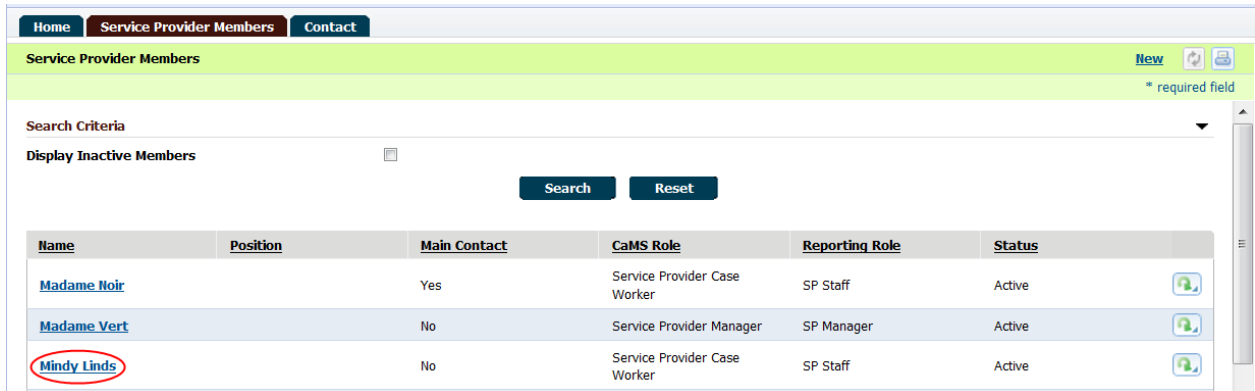
# EOIS Case Management System Service Provider User Guide

## 4.4.2 Modify Phone Number

### System Steps

#### ➤ Step 1: Service Provider Members

Navigate to the *Service Provider Member home* page by clicking their Name.

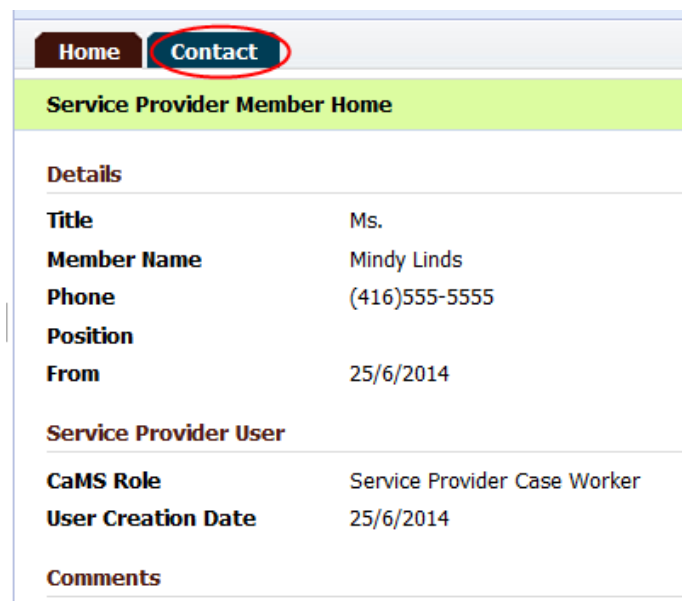


The screenshot shows the 'Service Provider Members' page. At the top, there are tabs for 'Home', 'Service Provider Members', and 'Contact'. Below the tabs is a green header bar with the text 'Service Provider Members' and a 'New' button. A search criteria section is present with a 'Display Inactive Members' checkbox and 'Search' and 'Reset' buttons. Below this is a table with the following columns: Name, Position, Main Contact, CaMS Role, Reporting Role, and Status. The table contains three rows: 'Madame Hoir', 'Madame Vert', and 'Mindy Linds'. The 'Mindy Linds' row is highlighted, and the name 'Mindy Linds' is circled in red.

Name	Position	Main Contact	CaMS Role	Reporting Role	Status
<a href="#">Madame Hoir</a>		Yes	Service Provider Case Worker	SP Staff	Active
<a href="#">Madame Vert</a>		No	Service Provider Manager	SP Manager	Active
<a href="#">Mindy Linds</a>		No	Service Provider Case Worker	SP Staff	Active

#### ➤ Step 2: Phone Numbers

To modify the phone number, click the **Contact** tab, and select Edit from the **Action Button** next to the phone number.



The screenshot shows the 'Service Provider Member Home' page. At the top, there are tabs for 'Home' and 'Contact'. The 'Contact' tab is circled in red. Below the tabs is a green header bar with the text 'Service Provider Member Home'. The page is divided into two main sections: 'Details' and 'Service Provider User'. The 'Details' section contains the following information: Title (Ms.), Member Name (Mindy Linds), Phone ((416)555-5555), Position, and From (25/6/2014). The 'Service Provider User' section contains the following information: CaMS Role (Service Provider Case Worker) and User Creation Date (25/6/2014). Below these sections is a 'Comments' section.

Details	
Title	Ms.
Member Name	Mindy Linds
Phone	(416)555-5555
Position	
From	25/6/2014

Service Provider User	
CaMS Role	Service Provider Case Worker
User Creation Date	25/6/2014

Comments

# EOIS Case Management System Service Provider User Guide

Phone Numbers								New		
Type	Area Code	Phone Number	Extension	TTY	From	To	Status			
Primary	416	5555555		No	25/6/2014		Active			
								Edit		

## ➔ Step 3: Modify Phone Number

Modify the phone number, and click Save.

Modify Phone Number

\* required field

Details

Type Primary

From 25/6/2014

To

Phone Number

Area Code 416

Phone Number 5555555

Extension

TTY ☐

Comments

## EOIS Case Management System Service Provider User Guide

### 4.4.3 Modify User Role

A Service Provider Manager can modify the user role of existing service provider members. Under the **Service Provider User** information panel, select the appropriate new **CaMS Role**: Service Provider Caseworker, Service Provider Administrator or leave the field blank for a non-system user.

The screenshot shows the 'Modify Service Provider Member' form. The 'CaMS Role' dropdown is highlighted with a red circle, showing options: 'Service Provider Case Worker' and 'Service Provider Administrator'. Other fields include Title, Member Name, Email, From, Preferred Language, Main Contact, Position, Reporting Role, Identity Verification, Challenge Question/Answer, and Comments.

Click **Save**. When the system role of a service provider member is changed, the member will be notified with an email confirmation. There is no email confirmation to the service provider member if the reporting role is changed.

If a member with a system role is changed to a non-system role, the system will disable the user ID in both the system and ONE-key. This means the user will no longer be able to access the system from the ONE-key home page.

If a member with a non-system role is changed to a system role and/or to a reporting role, the system will commence the registration process to access the system which involves the two emails for ONE-key enrollment and PIN generation.

# EOIS Case Management System Service Provider User Guide

## 4.5 Resetting User PIN

The system can only be accessed by a service provider user with a user PIN. If a service provider user forgets his or her PIN, it has to be reset by the member with the Service Provider Manager user role.

If a Service Provider Manager forgets his or her PIN, the ministry has to be contacted to have the PIN reset.

### System Steps

#### ➤ Step 1: Workspace

Click My Service Provider from the **My Shortcuts** list to navigate to the *Service Provider Home* page.

Select the **Service Provider Members** tab.

<b>Business Name</b>	ABJ Employment	<b>Provider Status</b>	Active
<b>Preferred Language</b>	English	<b>Geographic Region</b>	Central Region/Réi
<b>Max Number of Users</b>	15	<b>License Allocation</b>	10

[Home](#) [Service Provider Members](#) [Contact](#)

Service Provider Home:

IFIS Supplier Site

#### ➤ Step 2: Service Provider Members

Click the Name of the member that needs to be modified to navigate to that member's home page.

[Home](#) [Service Provider Members](#) [Contact](#)

Service Provider Members [New](#) [Print](#) [Export](#)

\* required field

Search Criteria

Display Inactive Members ☐

[Search](#) [Reset](#)

Name	Position	Main Contact	CaMS Role	Reporting Role	Status
<a href="#">Madame Noir</a>		Yes	Service Provider Case Worker	SP Staff	Active
<a href="#">Madame Vert</a>		No	Service Provider Manager	SP Manager	Active
<a href="#">Mindy Linds</a>		No	Service Provider Case Worker	SP Staff	Active

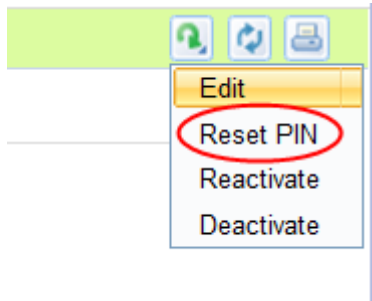


## EOIS Case Management System Service Provider User Guide

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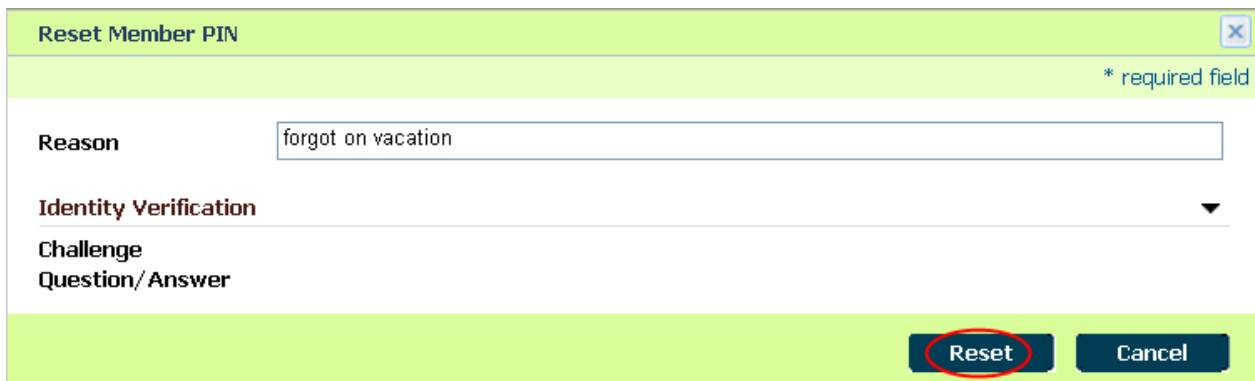
### ➡ Step 3: Service Provider Member

From the **Action Button**, click Reset PIN.



### ➡ Step 4: Reset Member PIN

Complete the **Reason**, and click Reset.

A screenshot of a web application form titled 'Reset Member PIN'. The form has a light green header bar with a close button (X) on the right. Below the header, there is a light green bar with the text '\* required field' on the right. The form contains several fields: a 'Reason' field with the text 'forgot on vacation', an 'Identity Verification' field with a dropdown arrow, a 'Challenge' field, and a 'Question/Answer' field. At the bottom right of the form, there are two buttons: 'Reset' and 'Cancel'. The 'Reset' button is circled in red.


## EOIS Case Management System Service Provider User Guide

### ➡ Step 5: Service Provider Home

The system will display a “PIN has been reset successfully” message.

[Home](#) [Contact](#)

Service Provider Member Home

 E1476: PIN has been reset successfully.


Details

<b>Title</b>	Ms.	<b>Preferred Language</b>	English
<b>Member Name</b>	Mindy Linds	<b>Main Contact</b>	No
<b>Phone</b>	(416)555-5555	<b>Email</b>	mlynds@beta.ca
<b>Position</b>		<b>Status</b>	Active
<b>From</b>	25/6/2014	<b>To</b>	

Service Provider User

<b>CaMS Role</b>	Service Provider Case Worker	<b>Reporting Role</b>	SP Staff
<b>User Creation Date</b>	25/6/2014		

Comments

	The system will immediately send out an email to the user with their user ID. Forty eight hours after this email is sent, a second email will be sent to the user with their new PIN.
---	---

### 4.6 Deactivating Service Provider Users

When a service provider member no longer requires access to the system, their user account must be deactivated. The proper maintenance of users in the system will support access requirements and help regulate the assigned maximum number of users for each service provider.



A user cannot be deactivated if there are any active service plans, tasks or reviews associated with that user. These items have to be reassigned to other members of the service provider before proceeding with the de-activation. See [Section 4.6.1](#) and [Section 4.6.2](#) for instructions.



If the user is assigned as an **Ontario Self-Employment Benefit Case Reviewer**, this role should be reassigned to another user. See [Section 4.12](#) for instructions.

#### System Steps

##### ➡ **Step 1:** *Workspace*

Click [My Service Provider](#) from the **My Shortcuts** list to navigate to the *Service Provider Home* page.

Select the **Service Provider Members** tab.

<b>Business Name</b>	ABJ Employment	<b>Provider Status</b>	Active
<b>Preferred Language</b>	English	<b>Geographic Region</b>	Central Region/Région
<b>Max Number of Users</b>	15	<b>License Allocation</b>	10

<b>Home</b>	<b>Service Provider Members</b>	<b>Contact</b>
-------------	---------------------------------	----------------

Service Provider Home:

IFIS Supplier Site

# EOIS Case Management System Service Provider User Guide

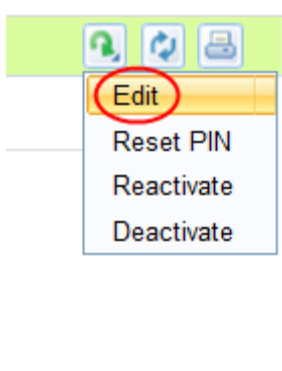
## ➡ Step 2: Service Provider Members

Click the Name next to the member that needs to be modified to navigate to that member's home page.

Name	Position	Main Contact	CaMS Role	Reporting Role	Status	Action Button
<a href="#">Madame Hloir</a>		Yes	Service Provider Case Worker	SP Staff	Active	
<a href="#">Madame Vert</a>		No	Service Provider Manager	SP Manager	Active	
<a href="#">Mindy Linds</a>		No	Service Provider Case Worker	SP Staff	Active	

## ➡ Step 3: Service Provider Member

From the **Action Button**, click Edit.



# EOIS Case Management System Service Provider User Guide

## ➡ Step 4: Modify Service Provider Member

Remove both the **CaMS Role** and **Reporting Role** from the user's profile, and click Save.

Modify Service Provider Member

\* required field

Details

Title \* Ms. Preferred Language \* English

Member Name \* Mindy Linds Main Contact ☐

Email \* mlynds@beta.ca Position

From 25/6/2014

Service Provider User

CaMS Role Reporting Role

Identity Verification

Challenge Question/ Answer

Comments

Save Cancel

## ➡ Step 5: Service Provider Member Home

From the **Action Button**, click Deactivate.

Home Contact

Service Provider Member Home

Details

Title	Ms.	Preferred Language	English
Member Name	Mindy Linds	Main Contact	No
Phone	(416)555-5555	Email	mlynds@beta.ca
Position		Status	Active
From	25/6/2014	To	

Service Provider User

CaMS Role Reporting Role

User Creation Date

Comments

Edit

Reset PIN

Reactivate

Deactivate

## EOIS Case Management System Service Provider User Guide

### ➤ Step 6: Task Redirection Details

If a user has any tasks, they will need to be reassigned to another user. Click on the drop-down menu to display a list of active users belonging to the same service provider.

**Task Redirection Details** ▼

Reassign Task To \*

### ➤ Step 7: Deactivate Service Provider Member.

Click Save.



A warning message will appear if there are service plans, tasks or reviews assigned to the user. These service plans, tasks and reviews must be closed or reassigned before the user can be deactivated. See [Section 4.6.1](#) and [Section 4.6.2](#) for instructions.

#### Modify Service Provider Member

✖ E1470: This member cannot be deactivated because there are still active service plans owned by this user.

[Details](#)

Note that notifications are automatically deleted after 30 days, and there is no need to delete them prior to deactivating a user.

## EOIS Case Management System Service Provider User Guide

### ➤ Step 8: Service Provider Member Home

The member's status will change to "Inactive."

Service Provider Member Home			
<b>Details</b>			
<b>Title</b>	Ms.	<b>Preferred Language</b>	English
<b>Member Name</b>	Mindy Linds	<b>Main Contact</b>	No
<b>Phone</b>	(416)555-5555	<b>Email</b>	mlynds@beta.ca
<b>Position</b>		<b>Status</b>	Inactive
<b>From</b>	25/6/2014	<b>To</b>	26/6/2014
<b>Service Provider User</b>			
<b>CaMS Role</b>		<b>Reporting Role</b>	
<b>User Creation Date</b>			
<b>Comments</b>			

### 4.6.1 Reassigning Service Plans

#### ➤ Step 1: Workspace

Click on Reassign Cases from the **My Shortcuts** list.

Workspace	Cases and Outcomes
Welcome to the EOIS Case Management S	
<b>My Shortcuts</b>	
<a href="#">Create a New Case</a>	
<a href="#">Create a New Employer</a>	
<a href="#">My Service Provider</a>	
<a href="#">Pending Reviews</a>	
<a href="#">Reassign Cases</a>	
<a href="#">Reassign Reviews</a>	
<a href="#">Search for a Case</a>	
<a href="#">Search for an Application</a>	
<a href="#">Search for an Employer</a>	
<a href="#">View My Bookmarks</a>	
<a href="#">View My Cases</a>	

## EOIS Case Management System Service Provider User Guide


### ➤ Step 2: Reassign Cases

Within the **Current Owner** panel, select the user who is currently the owner of the service plans, and then click Search.

**Reassign Cases** ✕

Reassign Cases

**Current Owner**

**Current Owner**   **Display Closed Cases** ☐

**Search** **Reset** **Cancel**

**Transfer To**


**New Owner**

**Transfer**

### ➤ Step 3: Reassign Cases

All service plans assigned to the user will be displayed within the **Search Results** panel. From the **New Owner** dropdown, select the new user.

**Responsable courant**

**Responsable courant**   **Afficher les cas fermés** ☐

**Rechercher** **Remettre** **Annuler**

**Transfert à**

**Nouveau responsable**  

**Transférer**

**Résultats de la recherche (Nombre d'éléments: 1)**

<input type="checkbox"/>	<u>Référence du cas</u>	<u>Client principal</u>	<u>Programme</u>	<u>Responsable</u>	<u>Point de service</u>	<u>Date de début</u>
<input type="checkbox"/>	3416326	Fakey McFake	Alphabétisation et formation de base	Miss Black	ABJ Employment - Toronto	26/6/2014



## EOIS Case Management System Service Provider User Guide

### ➤ Step 4: Reassign Cases

From the Search Results panel, click the check boxes beside the service plans to be reassigned or click the top checkbox to select all. Click Transfer.

**Reassign Cases** ✕

Reassign Cases

**Current Owner**

**Current Owner**   ☐

**Transfer To**

**New Owner**

**Search Results (Number of Items: 2)**


<input type="checkbox"/>	<u>Case Reference</u>	<u>Primary Client</u>	<u>Program</u>	<u>Owner</u>	<u>Location/Service Delivery Site</u>	<u>Start Date</u>
<input checked="" type="checkbox"/>	3416328	Probert Notrealski	Employment Service	Miss Black	ABJ Employment - Toronto	26/6/2014
<input type="checkbox"/>	3416326	Fakey McFake	Literacy and Basic Skills	Miss Black	ABJ Employment - Toronto	26/6/2014

### ➤ Step 5: Reassign Cases

The system will display a confirmation message when the selected cases have been successfully reassigned.

**Reassign Cases** ✕

Reassign Cases

 The selected cases have been reassigned.

**Current Owner**

**Current Owner**

# EOIS Case Management System Service Provider User Guide

## 4.6.2 Reassigning Reviews

Click on [Reassign Reviews](#) from the **My Shortcuts** list and follow the same steps outlined in Section 4.6.1.

## 4.7 Reactivating Service Provider Users

### System Steps

#### ➤ Step 1: *Workspace*

Click [My Service Provider](#) from the **My Shortcuts** list to navigate to the *Service Provider Home* page.

Select the **Service Provider Members** tab.

Business Name	ABJ Employment	Provider Status	Active
Preferred Language	English	Geographic Region	Central Region/Région
Max Number of Users	15	License Allocation	10

[Home](#) [Service Provider Members](#) [Contact](#)

Service Provider Home:

IFIS Supplier Site

#### ➤ Step 2: *Service Provider Members*

Select the **Display Inactive Members** checkbox, and click [Search](#).

[Home](#) [Service Provider Members](#) [Contact](#)

Service Provider Members

Search Criteria

Display Inactive Members ☒

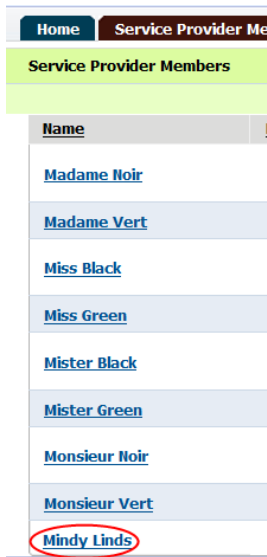
[Search](#) [Reset](#)

## EOIS Case Management System Service Provider User Guide

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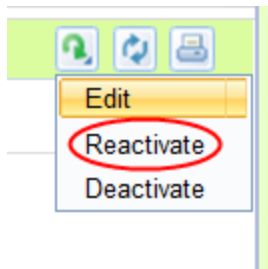
### ➤ Step 3: Service Provider Members

Click the Name next to the member that needs to be modified to navigate to that member's home page.



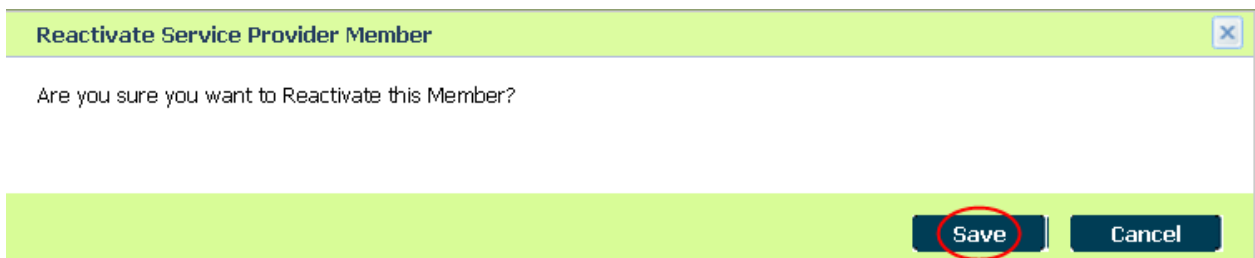
### ➤ Step 4: Service Provider Member Home

From the **Action** Button, click Reactivate.



### ➤ Step 5: Reactivate Service Provider Member

Click Save.



## EOIS Case Management System Service Provider User Guide

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### ➡ Step 6: Service Provider Member Home

The member's status has changed from "Inactive" to "Active."

<div>Home Contact</div>			
Service Provider Member Home			
Details			
Title	Ms.	Preferred Language	English
Member Name	Mindy Linds	Main Contact	No
Phone	(416)555-5555	Email	mlynds@beta.ca
Position		Status	Active
From	25/6/2014	To	
Service Provider User			
CaMS Role		Reporting Role	
User Creation Date			
Comments			

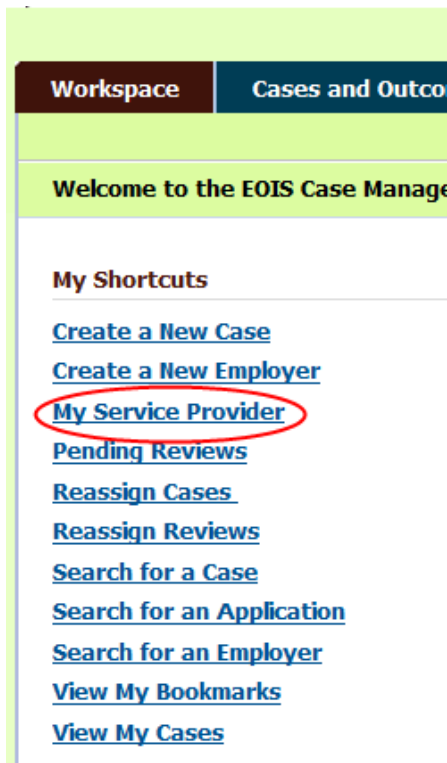
### 4.8 Creating Service Delivery Site Members

Service Delivery Site Member information is captured in the Service Provider Management module of the system. Service Delivery Site Members are not users of the system, but are contacts for the service delivery site.

#### **System Steps**

##### ➔ **Step 1:** *Workspace*

Click My Service Provider from the **My Shortcuts** list to navigate to the *Service Provider Home* page.



## EOIS Case Management System Service Provider User Guide

### ➤ Step 2: Service Provider Home

Click the Reference Number next to the appropriate Service Delivery Site.

<b>Home</b>	<b>Service Provider Members</b>	<b>Contact</b>
-------------	---------------------------------	----------------

**Service Provider Home:**

**Contact Details**

<b>Address</b>	175 BLOOR ST E TORONTO Ontario M4W3R8 Canada	<b>Phone Number</b>
----------------	--	---------------------

**Service Delivery Sites**

<u>Reference Number</u>	<u>Service Delivery Site Name</u>
<a href="#">6656A</a>	<a href="#">ABJ Employment - Thunder Bay</a>
<a href="#">6656B</a>	<a href="#">ABJ Employment - Dundas</a>
<a href="#">6656C</a>	<a href="#">ABJ Employment - Ottawa</a>
<a href="#">6656D</a>	<a href="#">ABJ Employment - Toronto</a>

### ➤ Step 3: Service Delivery Site Home

Select the **Service Delivery Site Members** tab.

<b>Home</b>	<b>Contact</b>	<b>Services</b>	<b>Service Delivery Site Members</b>
-------------	----------------	-----------------	--------------------------------------

**Service Delivery Site Home**

**Service Provider**

<b>Business Name</b>	ABJ Employment
----------------------	----------------

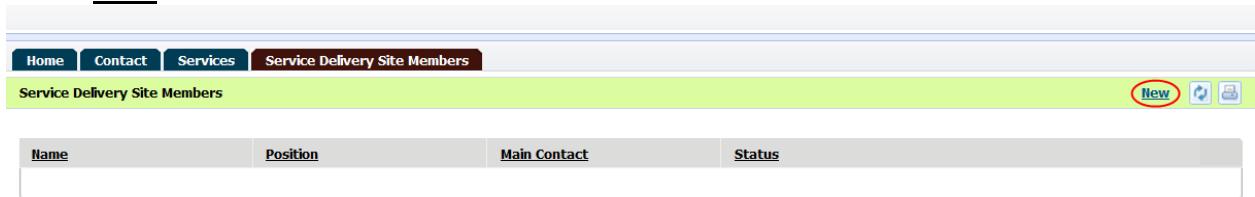
**Details**

<b>Service Delivery Site Name</b>	ABJ Employment - Thunder Bay
<b>Preferred Language</b>	English
<b>Preferred Communication</b>	
<b>Available For Service</b>	Yes
<b>Geographic Region</b>	Northern Region/Région du nord

## EOIS Case Management System Service Provider User Guide

### ➤ Step 4: Service Delivery Site Members

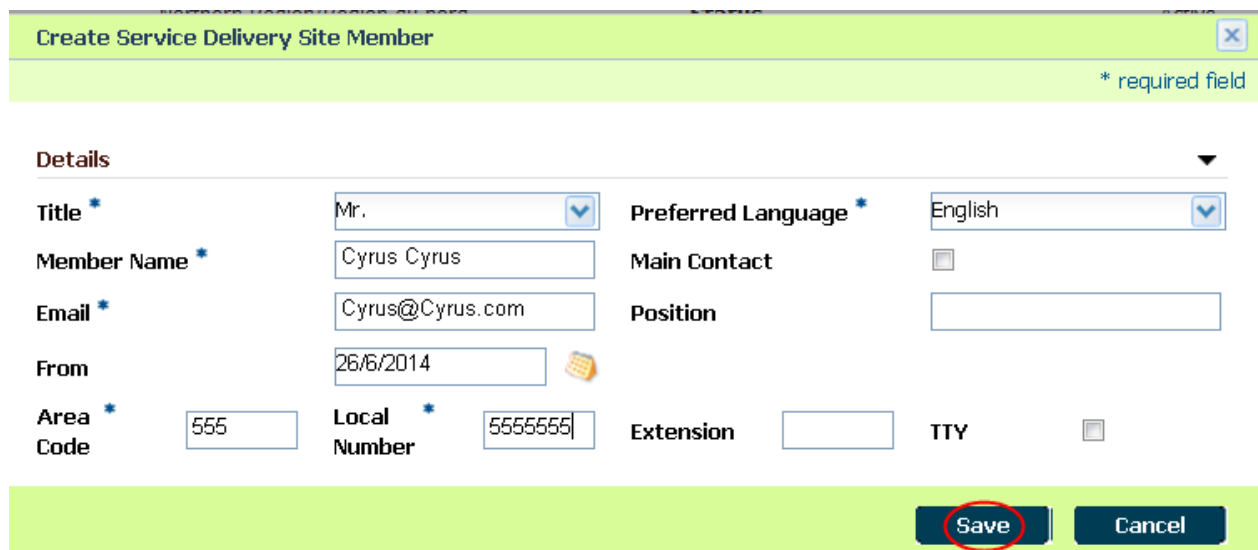
Click New.



Name	Position	Main Contact	Status
------	----------	--------------	--------

### ➤ Step 5: Create Service Delivery Site Member

Complete the required fields, and click Save.



Create Service Delivery Site Member

\* required field

**Details**

Title \* Mr. Preferred Language \* English

Member Name \* Cyrus Cyrus Main Contact ☐

Email \* Cyrus@Cyrus.com Position

From 26/6/2014

Area Code \* 555 Local Number \* 5555555 Extension TTY ☐

Save Cancel



Members at the service delivery site level are contacts and do not have a system user role. If a service delivery site member needs to access the system, they must be set up as a member at the service provider level and given the appropriate user role, as outlined in [Section 4.1](#).

### 4.9 Modifying Service Delivery Site Members


The Service Delivery Site Member information captured in the Service Provider Management module of the system can be modified.

#### 4.9.1 Modify Details

##### System Steps

##### ➤ **Step 1:** *Service Delivery Site Members*

Click Edit from the **Action Button** next to the appropriate service delivery site member.

Name	Position	Main Contact	Status	
<a href="#">Cyrus Cyrus</a>		No	Active	 <b>Edit</b>

##### ➤ **Step 2:** *Modify Service Delivery Site Member*

Make the required modifications, and click Save.

Modify Service Delivery Site Member

\* required field

Details

Title \*

Mr.

Preferred Language \*

English

Member Name \*

Cyrus Cyrus

Main Contact

☐

Email \*

Cyrus@Cyrus.com

Position

From

26/6/2014

To

Comments

Save

Cancel



## EOIS Case Management System Service Provider User Guide

### 4.9.2 Modify Main Contact

Only one main contact can exist for each service provider delivery site. In order to change the main contact, the original main contact has to be changed to a non-main contact. Navigate to the *Service Delivery Site Members* page, and edit the member who is currently recorded as the main contact, deselect the **Main Contact** checkbox, and click Save.

Home Contact Services <b>Service Delivery Site Members</b>			
Service Delivery Site Members			
<u>Name</u>	<u>Position</u>	<u>Main Contact</u>	<u>Status</u>
<a href="#">Colby Colby</a>		No	Active
<a href="#">Cyrus Cyrus</a>		Yes	Active

Edit an existing member or create a new member to become the new **Main Contact** by selecting the **Main Contact** checkbox and clicking Save.



It is important that each service delivery site has a **Main Contact** identified for ministry communication and administrative purposes. The initial **Main Contact** will be set up by the ministry when the service delivery site is registered in the system.

### 4.10 View Ministry Contacts

Service delivery sites that are performing services for the ministry are assigned a ministry contact. This contact is an internal CaMS user, who will manage the service delivery site to ensure that they are meeting their contractual obligations. If a service delivery site is unsure of their primary ministry contact, it can be located within the *Service Delivery Site Home* page.

Service providers can only view a ministry contact.

#### System Steps

##### ➤ **Step 1:** *Service Delivery Site Home*

Click the **Services** tab.

Home	Contact	<b>Services</b>	Service Delivery Site Members
------	---------	-----------------	-------------------------------

Service Delivery Site Home

**Service Provider**

**Business Name** ABJ Employment

**Details**

**Service Delivery Site Name** ABJ Employment - Thunder Bay

**Preferred Language** English

**Preferred Communication** Yes

**Available For Service** Yes

**Geographic Region** Northern Region/Région du nord

##### ➤ **Step 2:** *Services*

The ministry contact is located beside the corresponding service.

Home	Contact	<b>Services</b>	Service Delivery Site Members
------	---------	-----------------	-------------------------------

Services

Name	Start Date	End Date	Ministry Contact	Case Reviewer	Status
<a href="#">Employment Service</a>	24/6/2014		<a href="#">Jie Ai</a>		Approved

### 4.11 Creating and Modifying Service Provider Profile and Service Delivery Sites Contact Information

While ministry users must create a service provider's profile in the system, a number of additional fields within the service provider profile may be created or modified by service provider members who have either the Service Provider Manager or Service Provider Administrator user roles. The following fields can be modified, at both the service provider and service delivery site levels:

- Phone Number
- Email Address
- Web Address

The service provider address can be viewed by all service provider users but can only be modified by ministry staff. The reason is to provide data integrity between the EOIS Contract Management System and the EOIS Case Management System. If the address of the service provider or the service delivery site needs to be changed, the service provider should contact their ministry contact as per the regular business process.

The addresses for the service provider and service delivery sites can be viewed on the associated *Service Provider Home* page and *Service Delivery Site Home* page(s) as well as under the relevant **Contact** tabs.

Home Service Provider Members Contact					
Addresses					
Address	Type	Address	City	From	Status
Email Address	Business	175 BLOOR ST E , TORONTO, ON, M4W3R8	TORONTO	24/6/2014	Active
Phone Number	Mailing	175 BLOOR ST E , TORONTO, ON, M4W3R8	TORONTO	24/6/2014	Active
Web Address					

### 4.11.1 Assigning a Self Service Email Address

A specific email address must be assigned as “self service” in order for the **Self Service Notifications** checkbox on the *Service Delivery Site Home* page to be checked, and thus for email notifications to be received when Employment Ontario Self Service applications are submitted to the service delivery site.



Ensure that the email address is within the **Contact** folder of the service delivery site and not the service provider.

#### System Steps

##### ➤ **Step 1:** *Service Delivery Site Home*

Select the **Contact** tab.

<b>Home</b> <b>Contact</b> <b>Services</b> <b>Service Delivery Site Members</b>	
<b>Service Delivery Site Home</b>	
<b>Service Provider</b>	
<b>Business Name</b>	ABJ Employment
<b>Details</b>	
<b>Service Delivery Site Name</b>	ABJ Employment - Thunder Bay
<b>Preferred Language</b>	English
<b>Preferred Communication</b>	
<b>Available For Service</b>	Yes
<b>Geographic Region</b>	Northern Region/Région du nord

## EOIS Case Management System Service Provider User Guide

### ➤ Step 2: Service Delivery Site Contact

Click Email Address in the tab content bar.

The screenshot shows a web application interface. At the top, there is a navigation bar with four tabs: 'Home', 'Contact', 'Services', and 'Service Delivery Site Members'. The 'Service Delivery Site Members' tab is active. Below this, there is a sub-header 'Addresses'. On the left, there is a vertical menu with four options: 'Address', 'Email Address', 'Phone Number', and 'Web Address'. The 'Email Address' option is highlighted with a red circle. To the right of this menu, there is a table with two columns: 'Type' and 'Address'. The table contains two rows: 'Business' and 'Mailing', both with the address '500 DONALD THUNDER BA'.

Type	Address
Business	500 DONALD THUNDER BA
Mailing	500 DONALD THUNDER BA

### ➤ Step 3: Email Addresses

Click Edit from the **Action Button** next to the email address that is to be assigned to self service (or click New if none exist).

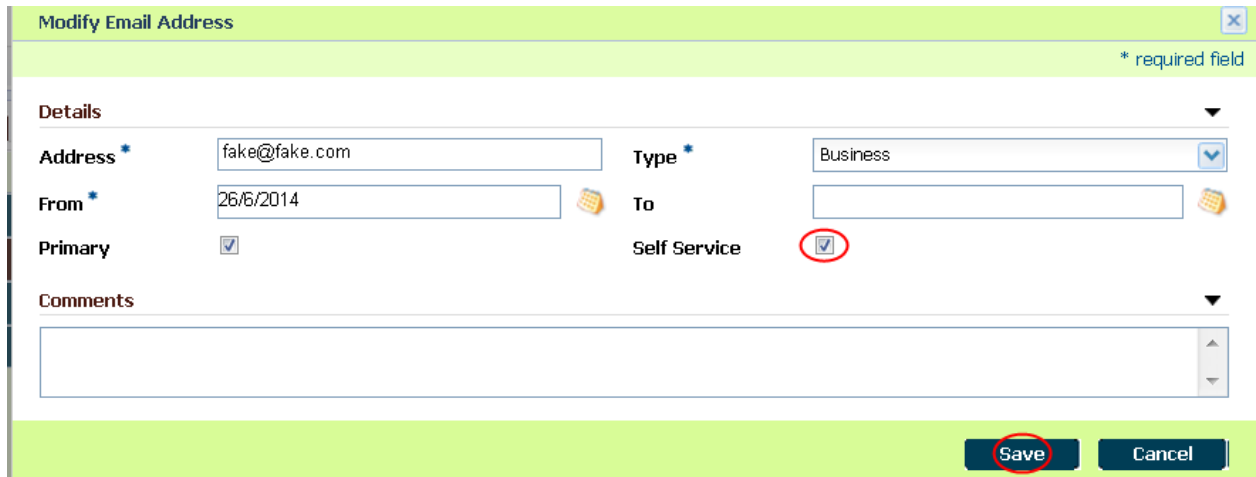
The screenshot shows a table titled 'Email Addresses'. The table has seven columns: 'Primary', 'Email Address', 'Type', 'Self Service', 'From', 'To', and 'Status'. There is one row of data. To the right of the table, there is an 'Edit' button highlighted with a red circle.

Primary	Email Address	Type	Self Service	From	To	Status
Yes	fake@fake.com	Business	No	26/6/2014		Active

## EOIS Case Management System Service Provider User Guide

### ➡ Step 4: *Modify Email Address*

Enter the required information and ensure that **Self Service Notification** is checked. Click Save.



Once the email address is saved, the **Self Service Notifications** field on the *Service Delivery Site Home* page will be automatically checked, meaning both fields will have values of “yes” and email notifications will be received when EOSS applications are submitted to the service delivery site.

It is, however, important to note that both the **Self Service Notification** field on the *Email Address* page and the **Self Service Notifications** field on the *Service Delivery Site Home* page must be checked in order to receive email notifications. There may be cases where one has been unchecked.

## EOIS Case Management System Service Provider User Guide

### 4.11.2 Modifying the Service Delivery Site Home Page

Authorized service provider users have the ability to modify information by clicking Edit from the **Action Button** on the *Service Delivery Site Home* page.

Modify Service Delivery Site: ABJ Employment - Thunder Bay - 6656A

\* required field

**Details**

Service Delivery Site Name	ABJ Employment - Thunder Bay	Designated Francophone	No
Preferred Language *	1 English	Utilizing Data File	2 Yes
Preferred Communication	3	Geographic Region	4 Northern Region/Région du nord
Local Board Number		Available For Service	5 <input checked="" type="checkbox"/>
Self Service Notifications	6 <input checked="" type="checkbox"/>	Email Address	7 fake@fake.com

**Comments**

Save Cancel

1 – The language preference of the service delivery site.

2 – **Utilizing Data File** allows the ministry to capture if the service delivery site is using data files for reporting purposes. If a service delivery site wants to receive data files, they must select “Yes.”

3 – The preferred method of communication for the service delivery site (e.g. hardcopy, email, etc.).

4 – The **Geographic Region** where the service delivery site is located. The region can be viewed by all service provider users but can only be modified by authorized ministry staff.

5 – The **Available for Service** checkbox indicates the service delivery site's availability to accept Employment Ontario Self Service (EOSS) applications. For more information on EOSS Applications, see Chapter 11 and the *Employment Ontario Self Service (EOSS) Training Resource Guide for ES, SJS & LBS Service Providers*.

## EOIS Case Management System Service Provider User Guide

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6 and 7– The **Self-Service Notifications** checkbox determines whether a service delivery site will receive email notifications when EOSS applications are submitted. An **Email Address** must be specifically assigned as “self service” in order for the **Self-Service Notifications** checkbox to be checked (see Section 4.11.1 ).

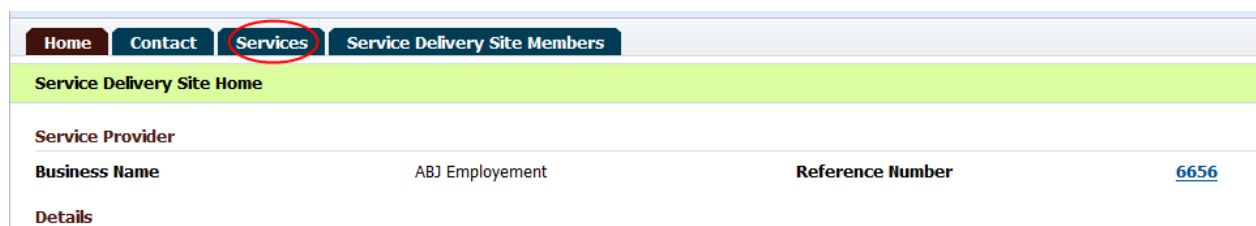
### 4.12 Assigning a user as an Ontario Self-Employment Benefit Case Reviewer

For Ontario Self-Employment Benefit (OSEB) service providers, a **Case Reviewer** can be assigned at the service delivery site level. The **Case Reviewer** is assigned all reviews for OSEB product delivery cases assigned to the service delivery site, and these reviews will appear in their *Pending Reviews* list. All users within the service provider will still be able to complete any reviews within their organization regardless of to whom it is assigned and any review can still be forwarded to another user (for information on forwarding reviews, see Section 4.6.2).

#### System Steps

##### ➡ **Step 1:** *Service Delivery Site Home*

Select the **Services** tab.



The screenshot shows the 'Service Delivery Site Home' page. At the top, there is a navigation bar with four tabs: 'Home', 'Contact', 'Services', and 'Service Delivery Site Members'. The 'Services' tab is highlighted with a red circle. Below the navigation bar, the page title 'Service Delivery Site Home' is displayed. Underneath, there is a section titled 'Service Provider' which contains a table with two rows: 'Business Name' and 'Reference Number'. The 'Business Name' row shows 'ABJ Employment' and the 'Reference Number' row shows '6656'. A 'Details' link is visible at the bottom of the table.

Service Provider	
Business Name	ABJ Employment
Reference Number	<a href="#">6656</a>

[Details](#)



# EOIS Case Management System Service Provider User Guide

## ➤ Step 2: Services

Click Ontario Self-Employment Benefit Program.

Home Contact Services Service Delivery Site Members			
Services			
Name	Start Date	End Date	Minis
<a href="#">Employment Service</a>	24/6/2014		<a href="#">Jie Al</a>
<a href="#">Ontario Self-Employment Benefit Program</a>	26/6/2014		<a href="#">Jie Al</a>

## ➤ Step 3: Services

Click Edit.

Home Business Plans Aggregate Data Recent Changes			
Service Home			
Service Delivery Site			
Name	ABJ Employment - Thunder Bay	Reference Number	<a href="#">6656A</a>

## ➤ Step 4: Modify Service

Click the magnifying glass icon next to **Case Reviewer**.

Modify Service: ABJ Employment - Thunder Bay - 6656A - Ontario Self-Employment Benefit Program

\* required field

Details

Service

Ontario Self-Employment Benefit Program

End Reason

Start Date

26/6/2014

End Date

Ministry

Jie Aho

Case Reviewer

Comments

Save

Cancel

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### ➤ Step 5: User Search

Click **Select** next to the appropriate service provider user.

User Search ✕

Search Results ▼

Action	First Name	Last Name	User Name	Position	Organization Unit	Organization Structure	End Date
<a href="#">Select</a>	Madame	Noir	IAAR007721	<a href="#">Caseworker I Chargé de cas 283656</a>	<a href="#">ABJ Employment</a>	Employment Ontario	



### ➤ Step 6: Modify Service

Click Save.

Modify Service: ABJ Employment - Thunder Bay - 6656A - Ontario Self-Employment Benefit Program ✕

\* required field

Details ▼

Service	Ontario Self-Employment Benefit Program	End Reason	
Start Date	26/6/2014	End Date	
Ministry Contact	Jie Ai	Case Reviewer	Madame Noir  

Comments ▼

Save

Cancel

### 4.13 Field Values Table

Field Name	Acceptable Values	Description
Email Address Type	-Business -Personal	Service provider or service delivery site's email address type.
Phone Number Type	-Alternative -Fax -Primary	Service provider or service delivery site's phone number type.
Preferred Language	-English -French	Preferred language of member, service provider, or service delivery site.
Preferred Communication	-Data Transfer -Email -Fax -Hard Copy -Phone	The preferred communication method for the service delivery site
Utilizing Data File	-Yes -No	Informs the ministry whether the service delivery site is using the data files provided on the EOIS Service Provider Reporting Website
Title	-Dr. -Miss -Mr. -Mrs. -Ms. -Prof.	Designated title of member.
User Role	-Service Provider Caseworker -Service Provider Administrator	User role of service provider member in the Case Management System.
Available for Service	-Yes (checked) -No (unchecked)	Indicates the service delivery site's availability

## EOIS Case Management System Service Provider User Guide

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Field Name	Acceptable Values	Description
		to accept Employment Ontario Self Service (EOSS) applications.
Self Service Notifications	-Yes (checked) -No (unchecked)	Determines whether a service delivery site will receive email notifications when EOSS applications are submitted.
Self Service Notification (within the <b>service delivery site</b> email address)	-Yes (checked) -No (unchecked)	Specifies the specific email address to be used for self service email notifications. The value of <b>Self Service Notifications</b> on the <i>Service Delivery Site Home</i> page must be "Yes" for notifications to be sent to the assigned email address.